RDP User Guide

1 — Last update: 2018/02/16

Faces and Voices of Recovery

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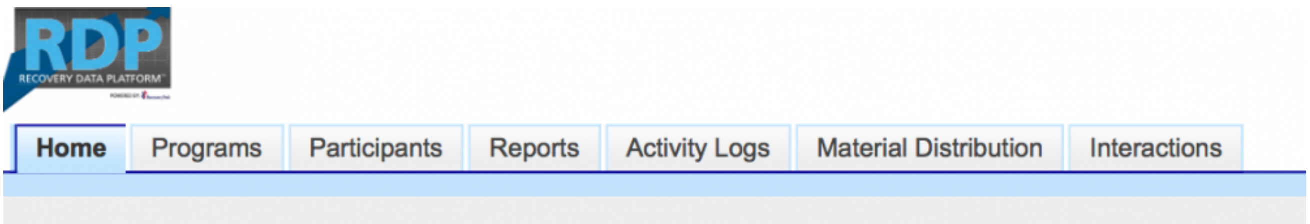
1. Recovery Data Platform (RDP) Introduction

Welcome! The Recovery Data Platform (RDP) is a cloud-based software solution developed in part by Faces and Voices of Recovery and Recovery Trek. The purpose of the platform is to aid RCO's and Peer Service Providers with the tools and assessments needed to effectively implement peer recovery coaching programs. Through the use of robust reporting and scheduling tools, RDP is able to provide your organization better outcomes data and service management.

2. RDP Overview

Navigation in RDP is fairly straightforward, with two navigation menus and a sidebar. Both navigation menus, along the top of each page and in the footer, allow you to navigate to different segments of RDP – Home, Programs, Participants, Reports, Activity Logs, Material Distributions and Interactions.



The sidebar provides additional navigation tools, including an advanced search bar, a recent items list, an activity log and profile settings.

Advanced Search

Recent Items

- Monty Python
- Freddie Mercury
- FAVOR
- FAVOR TRS
- William Wilson
- Distribution-2105
- James Bond
- Activity-4399
- Obi Wan Kenobi
- Activity-4400

Activity

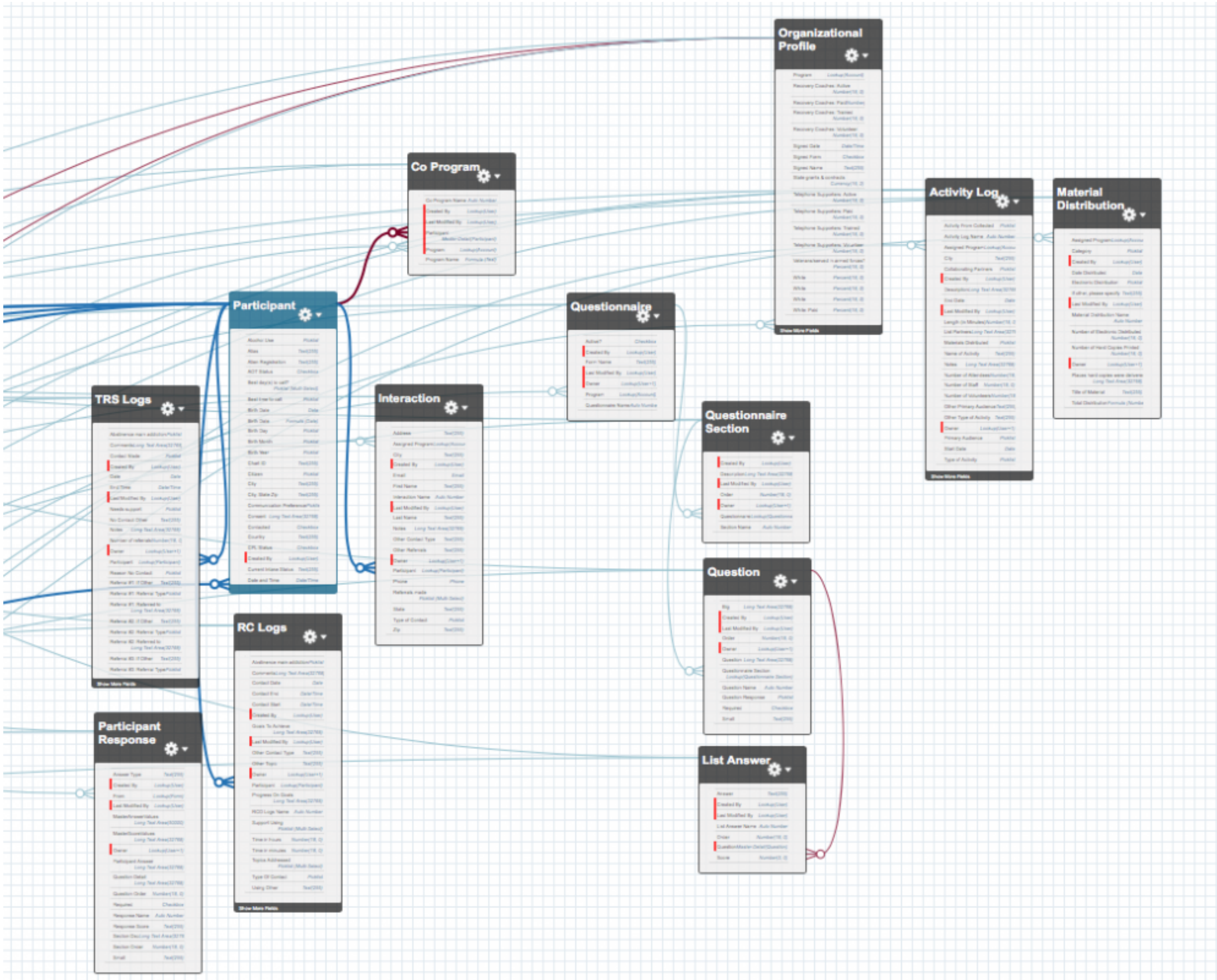
- Activity Log

Welcome, FAVOR RCO

My Profile | Logout

RDP comes equipped, out of the box, with the following tools:

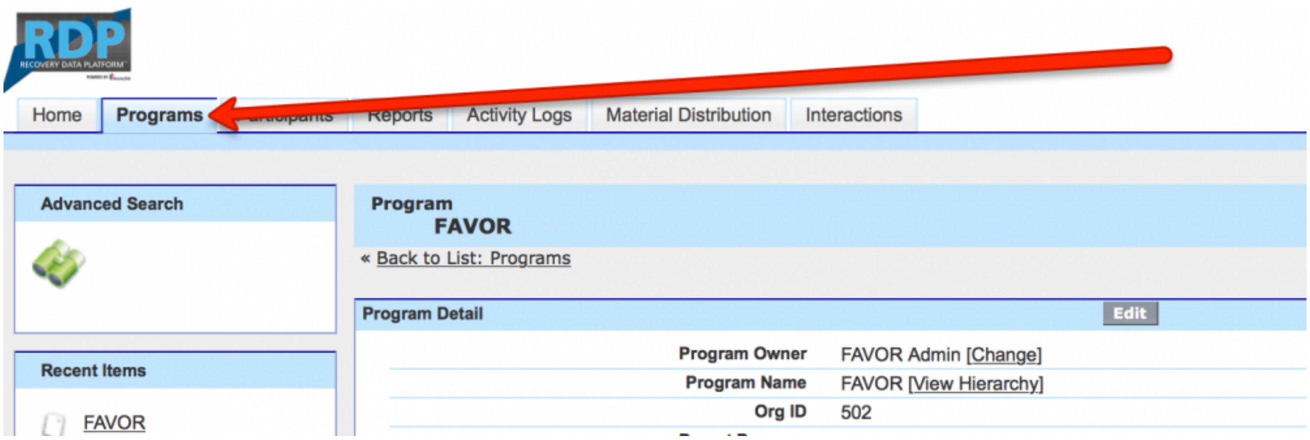
- Program Management
    - This tool allows your organization to create several different programs, each with their own unique descriptions and assessment tools
- Participant Management
    - This tool helps your organization keep meticulous records on all program participants, including contact and demographic information, and recovery vital signs.
- Telephone Recovery Support Dashboard
    - This dashboard provides your team with a dynamic list of program participants, highlighting which participants need to be called, and when.
- Resource Material Management
    - This tool helps your organization create and track digital and physical resource materials that are distributed
- Activity and Event Management
    - Activities and events hosted by your organization can be easily recorded, and reported on, in RDP
- Interactions
    - Interaction recording allows you to capture information that details individual interactions with your organization. This tool is especially helpful in tracking contact points with people who are not program participants.
- Reporting
    - The base RDP license package includes access to several powerful built-in reports and charts that empowers your organization to see and work within your data.
    - Should your organization’s unique needs require custom reports, you can work with Faces and Voices to determine the best solution. Report Creation Licenses are available for an additional fee, or Faces and Voices be hired to build the custom reports for your organization.



RDP is designed with your organization's unique needs in mind and has several features built-in that allow you to customize the platform to your organization's needs.

3. Getting Started with Programs

Programs, as previously noted, allow your organization to keep services and participants organized by the program they are enrolled in. Please keep in mind that only instance administrators will have permission to create and edit program details. The program interface can be accessed by instance administrators by clicking on “Programs” in the top navigation menu.

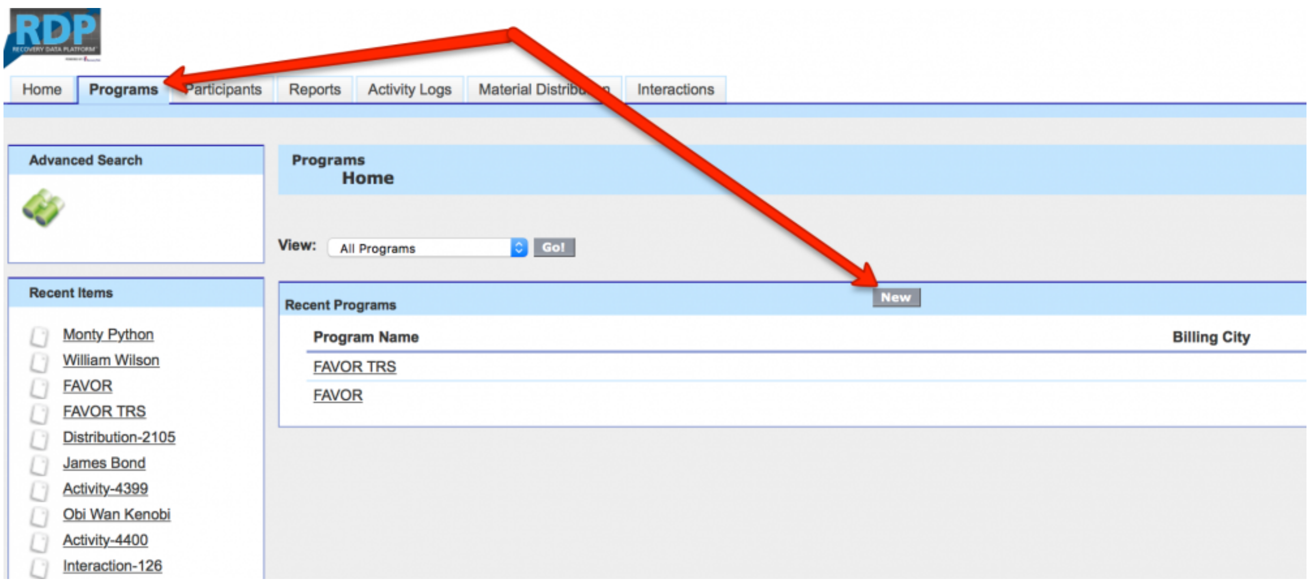


Upon first logging in to your organization’s instance of the Recovery Data Platform, only one program is configured. This program is the parent (or master) program and, generally, shares a name with your organization. It is important to populate the parent program with organization details, i.e. description, contact information, and Organization ID. When creating new programs, this is the program that will be referenced in the “Parent Program Field.”

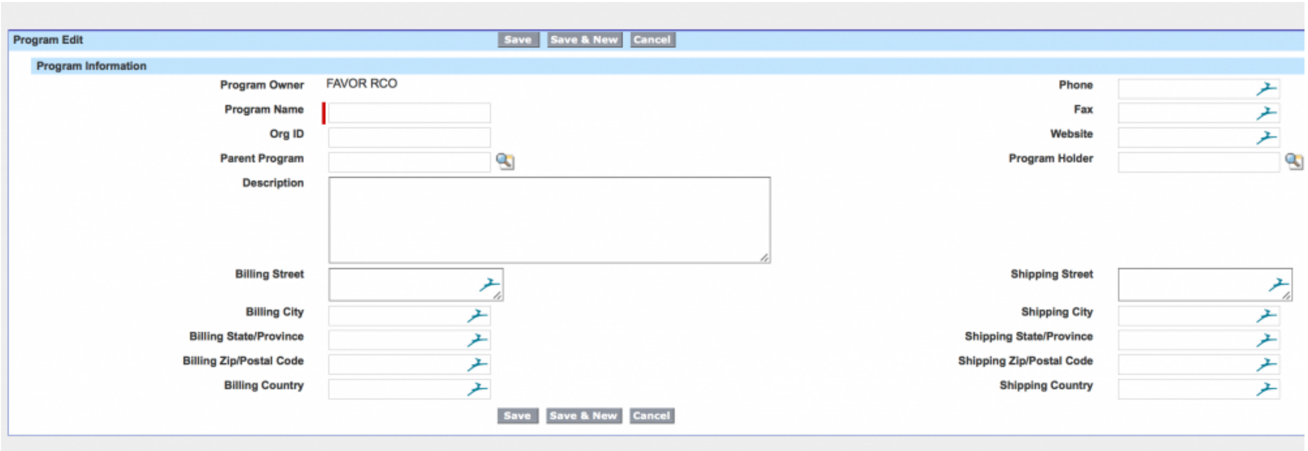
3.1. Adding a New Program

Often times, organizations operate and implement several programs at a given time, each with unique needs and data points. The RDP provides the capacity to create, track and report on different programs with relative ease.

In order to create a new program, navigate to the 'Programs' tab in the top navigation menu, and click on the grey 'New' button.

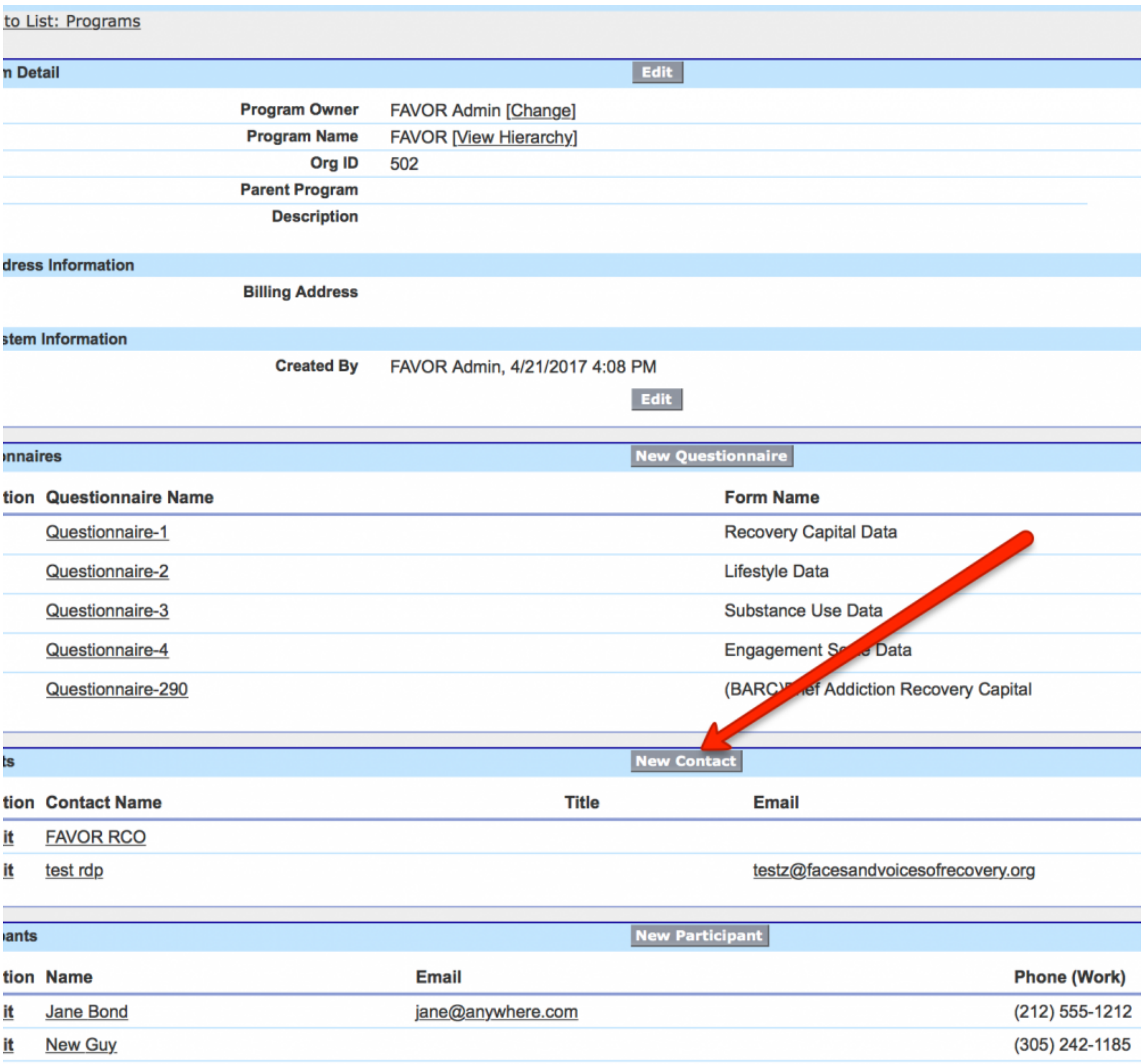


This action will take you to an empty form, in which you'll need to fill out the details of the new program. When filling this form out, it is necessary to assign a parent program. This parent program should be the name of the organization. After finishing the form, be sure to click save!


Program Edit
Save
Save & New
Cancel
Program Information
Program Owner
FAVOR RCO
Program Name
Org ID
Parent Program
Description
Phone
Fax
Website
Program Holder
Billing Street
Billing City
Billing State/Province
Billing Zip/Postal Code
Billing Country
Shipping Street
Shipping City
Shipping State/Province
Shipping Zip/Postal Code
Shipping Country
Save
Save & New
Cancel

3.2. Setting up a New User

Each organization’s RDP instance license includes 10 individual user licenses, and establishing a new user is a simple process. First, you’ll need to navigate back to the master/parent program page, and click on the grey “New Contact” button.



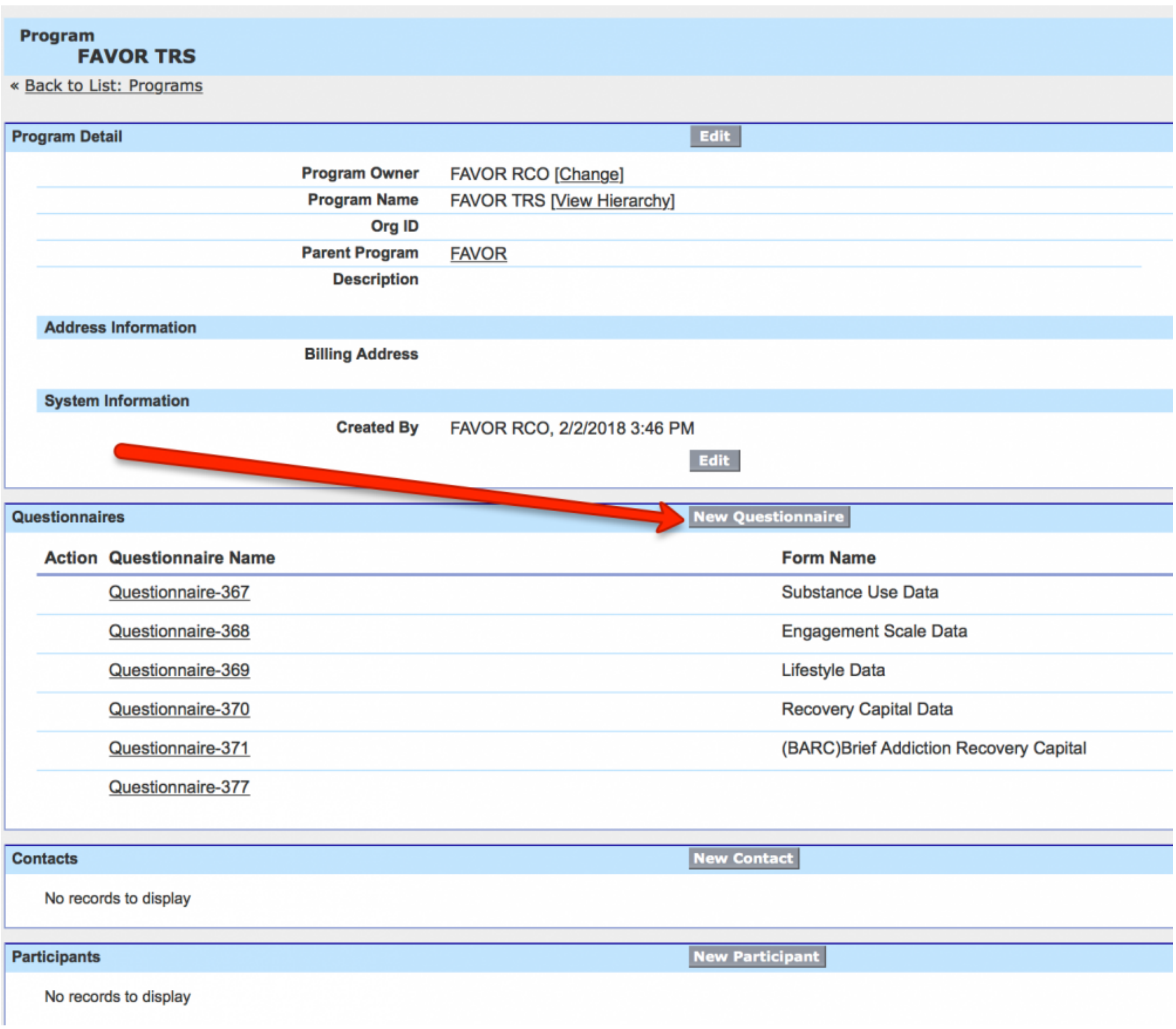
Next, you'll need to fill out the form with the new user's information. After completing this form, click save.

The last required step is for your instance administrator to email rdp@facesandvoicesofrecovery.org and request for the new user to be enabled.

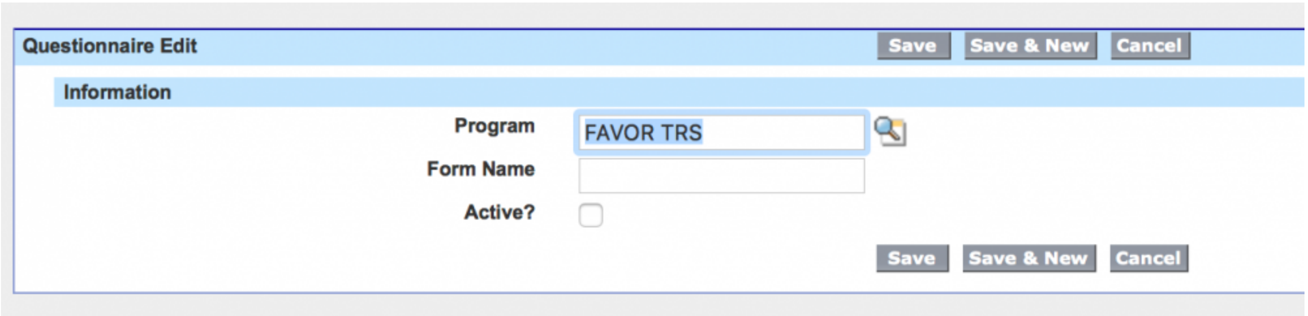
3.3. Customizing Assessment Tools

As previously discussed, separate programs often require unique assessment tools, and the Recovery Data Platform allows your organization the flexibility to create program-specific questionnaires that capture additional data points.

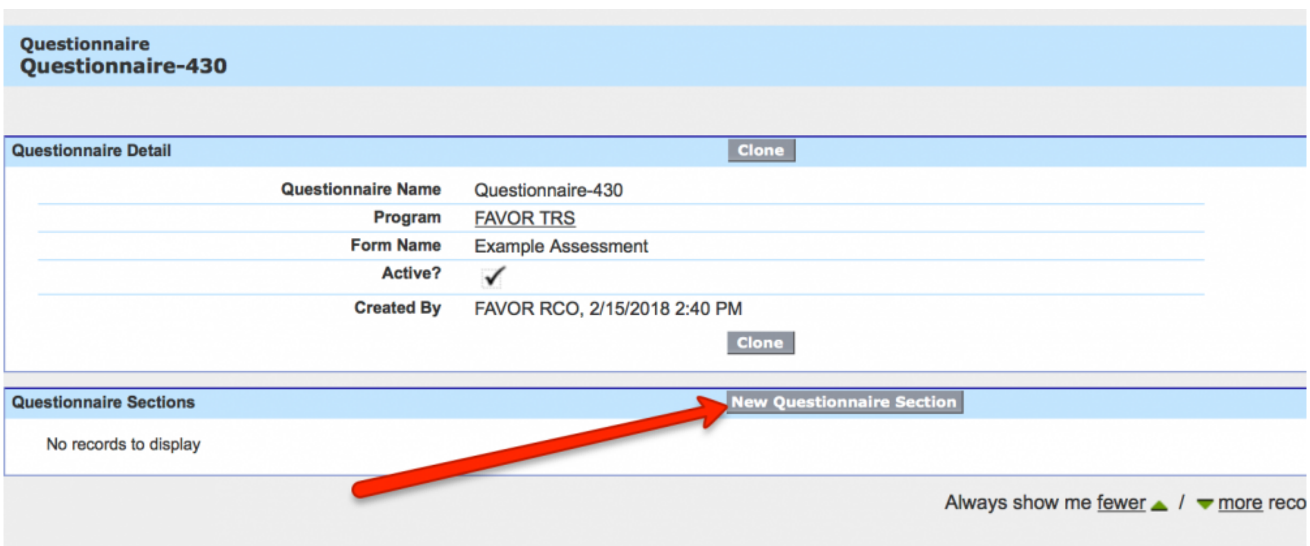
First, you'll need to navigate to the appropriate program to create the new questionnaire. Next, you'll click on the grey "New Questionnaire" button.



Next, you'll confirm the program that this questionnaire will be active for, name the program, and activate the form. After completing these three fields, click save.



You'll then be taken to a page where you can define the new questionnaire's structure. Often times, shorter questionnaires only require a single section. For longer assessments, it's generally beneficial to separate the questionnaire into multiple sections. On this page, you can create and title new questionnaire sections by clicking the grey "New Questionnaire Section" button. Please bear in mind that each questionnaire requires at least one section.

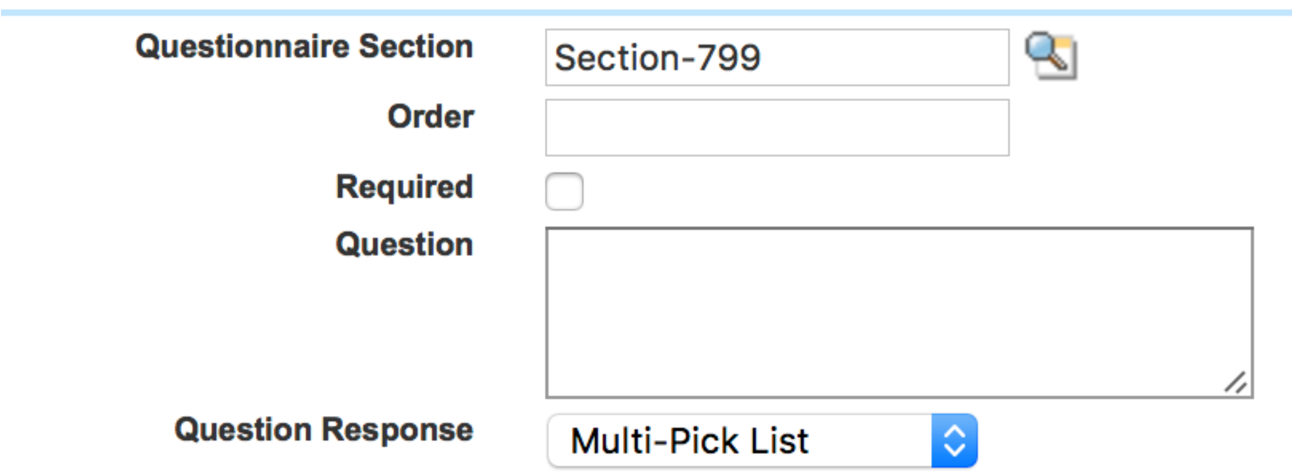


In each questionnaire section, your organization is able to add new questions by clicking on the grey "New Question" button. You'll be taken to a page that allows you to construct the question with the following fields:

- Questionnaire Section
  - This field is autopopulated, but allows you to change the location of this question if needed
- Order

    - This field dictates the order of the question (i.e. if order is set to 1, this will be the first question in the section)
- Required
    - This checkbox allows you to make this question required or optional
- Question
    - This field is where you will compose the question
- Question Response
    - This drop-down menu allows you to dictate how the question is answered, with the following options:
        - Text
        - Pick list (or drop-down menu)
        - Multi-Pick List (allows multiple options to be selected from a drop-down menu)
        - Pick list with other (automatically creates 'other' option in drop-down menu)
        - Slider

After you've created the question, click save. If you're in the process of creating multiple questions, clicking on "Save and New" will return you to a fresh question creation form. When creating a picklist, you'll be taken to a new form where you can detail what answers are included in the drop-down menu.



4. Navigating Participants

Participant records can be accessed by navigating to the ‘Participants’ tab in the top navigation menu, or by navigating to the program that the participant is enrolled in. When navigating to a participant record, you’ll see the existing details of the record. Should you need to edit the record, you can click the grey “Edit” button. Each participant record is broken apart into several sections:

- Participant Detail
  - This section provides basic details regarding the participant, including name, program, birthdate, gender and other basic data points
- Contacct Information
  - This section provides details surrounding contact information, communication preferences, and address details
- Demographics
  - This section provides demographic data points often required for grant reporting
- Number of Children
  - This section allows for the entry of child custody details
- Legal Status
  - This section provides details surrounding the participant’s involvement in the criminal justice system
- Calling Preference
  - This section details the program participant’s calling preference
- Contact Consent
  - This section covers e-consent for contacting the program participant
- Recovery Vital Signs
  - This section includes links to Recovery Vital Sign Reports pertaining to the participant, which we’ll cover in more depth in the next section
- Forms
  - This section provides access to recent completed assessments, and provides the option to record new assessments for the participant
- Intake Information
  - This section details prior intake assessments, and provides the option to record new intake forms, which we’ll cover in more depth in the further sections
- Interactions
  - This section details prior interactions, and provides the option to record new interaction forms, which we’ll cover in more depth in the further sections
- TRS Logs

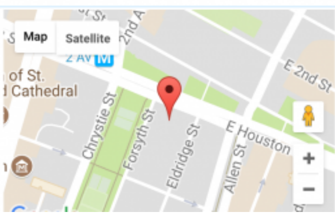
    - This section details prior TRS logs, and provides the option to record new logs, which we'll cover in more depth in the further sections
- RC Logs
    - This section details prior RC logs, and provides the option to record new logs, which we'll cover in more depth in the further sections

Participant Detail Edit Clone

Name	Monty Python	**Birth Date**	2/18/1960
First Name	Monty	**Birth Day**	18
Middle Name		**Birth Month**	02
Last Name	Python	**Birth Year**	1960
Alias		**Social Security #**	XXX-XX-6788
Program	FAVOR	**Gender**	Male
		Other Gender	
		Orientation/Identity	Straight
		Other Orientation/Identity	

Contact

Facility		**Email**	holygrail123@outlook.com
Street Address	143 E Houston St	**Phone (Work)**	
City	New York	**Phone (Work) Ext**	
State	NY	**Phone (Home)**	
County		**Phone (Cell)**	(212) 260-7280
Zip	10002	**Communication Preference**	Cell
Move In Date	1/15/2018	**Leave Voicemail Messages**	Yes
Lives With	Girlfriend		
Lives in	Own/rent apartment	**Phone (Other)**	
		Other Phone Type	
		Leave Voicemail Messages Other	



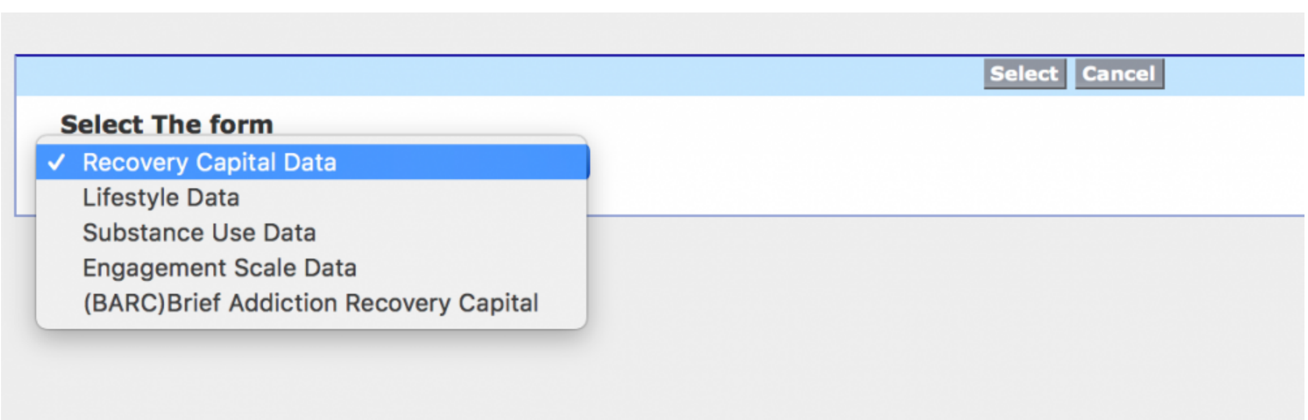
4.1. Recovery Vital Signs

Recovery Vital Signs (RVS) are tools native to the Recovery Data Platform that allow your organization insight into the recovery of program participants. These vital signs are comprised of several evidence-based assessment tools, including:

- Engagment Scale
  - Outcome Rating Scale
  - Relationship Rating Scale
  - Craving Rating Scale
- Assessment of Recovery Capital

These assessment tools aid in constructing a qualitative recovery story for each program participant. In order to view one of the seven available participant reports, click into one of the links under the 'Recovery Vital Signs' section.

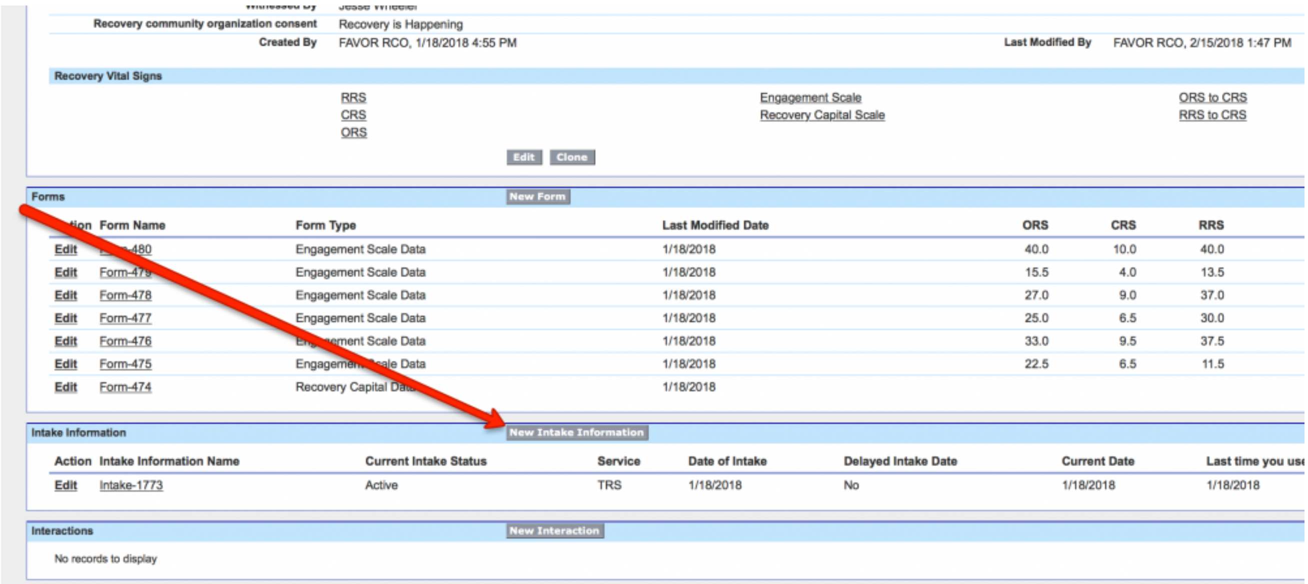
The assessments (or questionnaires) that RVSs are comprised of are the Engagement Scale Questionnaire and the Recovery Capital Assessment. To complete a new assessment for a participant, click the grey 'New Form' button in the forms section, and select either the Recovery Capital Data or Engagement Scale Data form.



Organizations are contractually bound to complete an engagement scale data form once a week per participant, or at every touch-point with program participants, and a Recovery Capital Data form every 6 months per participant. This data aids in national advocacy efforts.

4.2. Recording an Intake

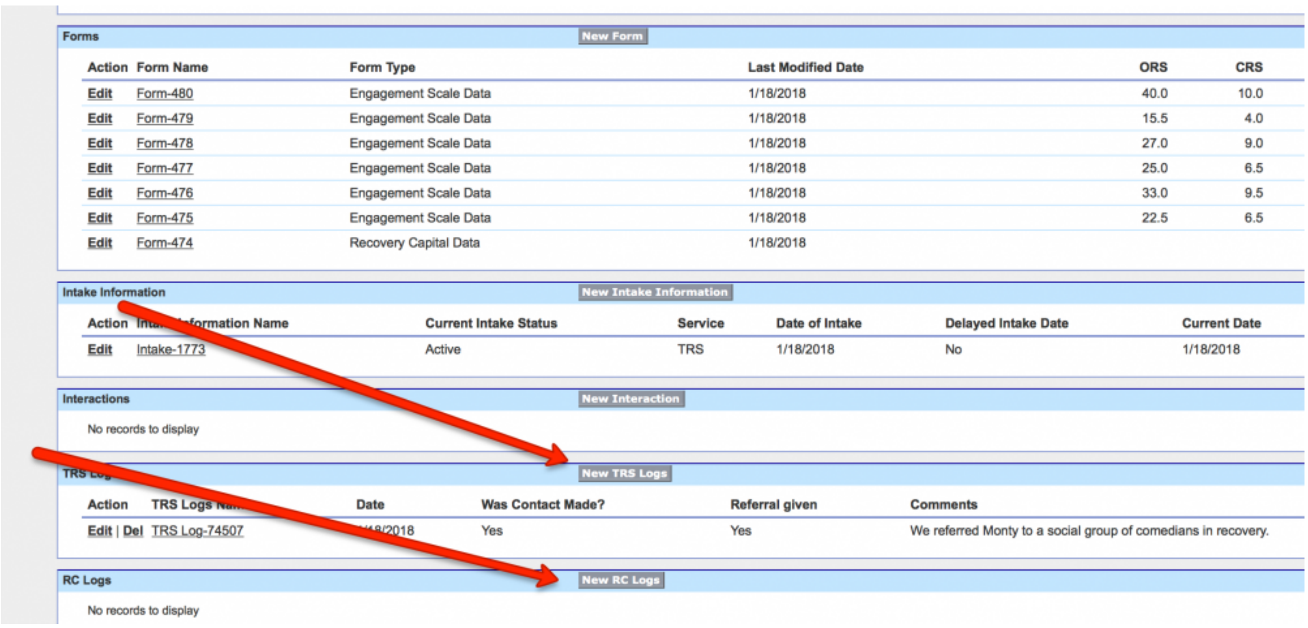
The Intake Information form enables organizations to collect important details that capture the beginning of a program participant's recovery story. After creating a new participant, intake information can be entered by clicking on the grey "New Intake Information" button.



When in the intake information form, your organization can fill important information, such as recovery date, service type, living status and recovery support. After completing the intake form, be sure to click save!

4.3. TRS and RC Logs

Telephone Recovery Support (TRS) and Recovery Coach (RC) logs document the services your organiation provides to program participants, which captures notes and referrals made. To complete a TRS or RC Log, scroll to the bottom of a participant's page and click the grey "New TRS Logs" or "New RC Logs" button.



5. Using RDP to Administer Telephone Recovery Support (TRS)

The home page of the Recovery Data Platform is optimized for telephone recovery support services, and provides an automatically generated list of program participants due for TRS services. This module is broken apart into several sections that identify the best time to contact the program participants:

- Morning Calls Pending
- Evening Calls Pending
- Afternoon Calls Pending
- Calls that can be made anytime

Morning Calls Pending: 5

Name(Last, First)	Phone (Cell)	Phone (Home)
James, Bond-Test 3		
New, Guy	(561) 283-3197	
Jane, Bond		(212) 555-1313
James, Bond	(123) 456-7890	
William, Wilson		(507) 218-4773

Evening Calls Pending: 0

Afternoon Calls Pending: 1

Name(Last, First)	Phone (Cell)	Phone (Home)
James, Bond-Test 2	(507) 555-1212	(507) 242-1123

Anytime Calls Pending: 1

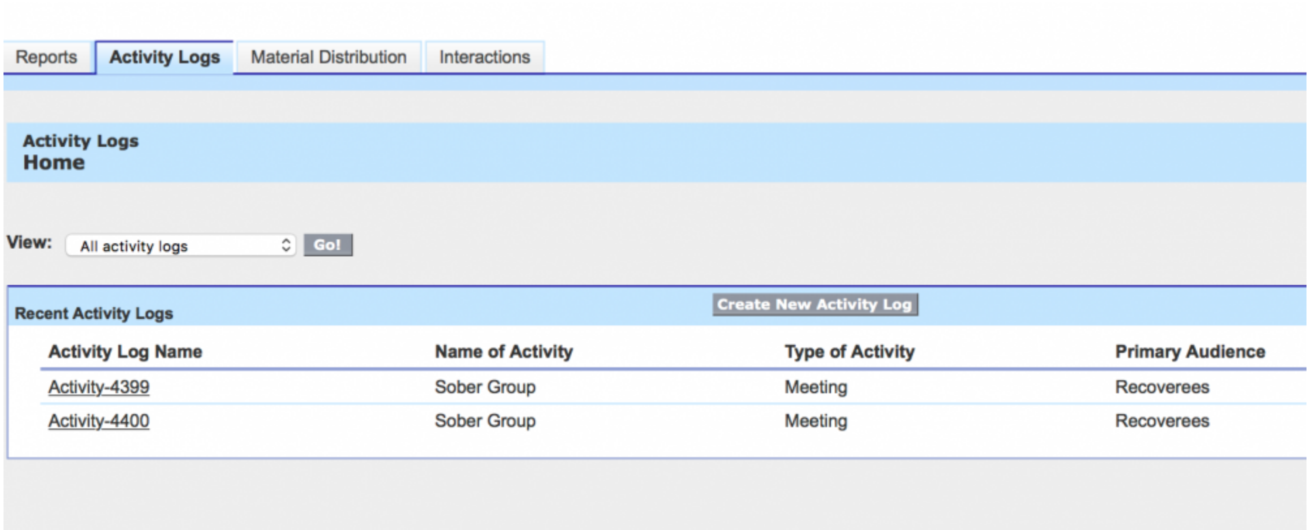
Name(Last, First)	Phone (Cell)	Phone (Home)
Freddie, Mercury		(123) 456-7890

None Calls Pending: 0

When delivering TRS, you'll need to log the call. To log service delivery with a participant, click into the participant's name and click on the grey "New TRS Logs" button. Additional instruction for entering TRS Logs can be found in section 4.3, TRS and RC Logs.

6. Recording Events and Activities

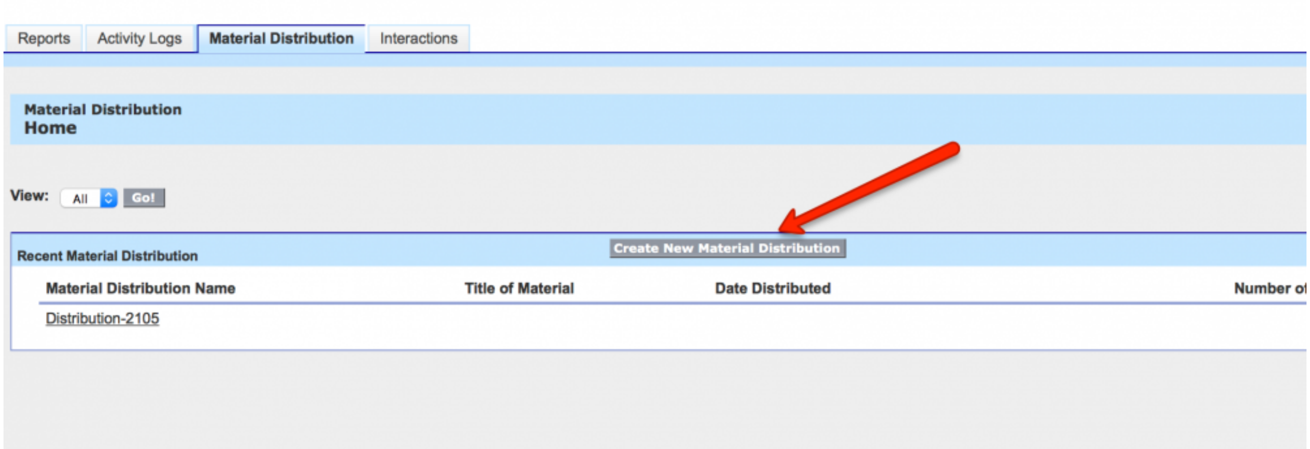
Activities and events hosted by your organization can be easily recorded, and reported on in RDP. Whether your organization wants to record a support group, a training or an event, this data can be entered under the 'Activity Logs' section. After navigating to the 'Activity Logs' section of RDP, you can click on 'Create New Activity Log' to record a new event.



In the activity log, you'll be able to record details pertaining to the activity, including activity type, primary audience, associated program, etc.

7. Accounting for Material Distributions

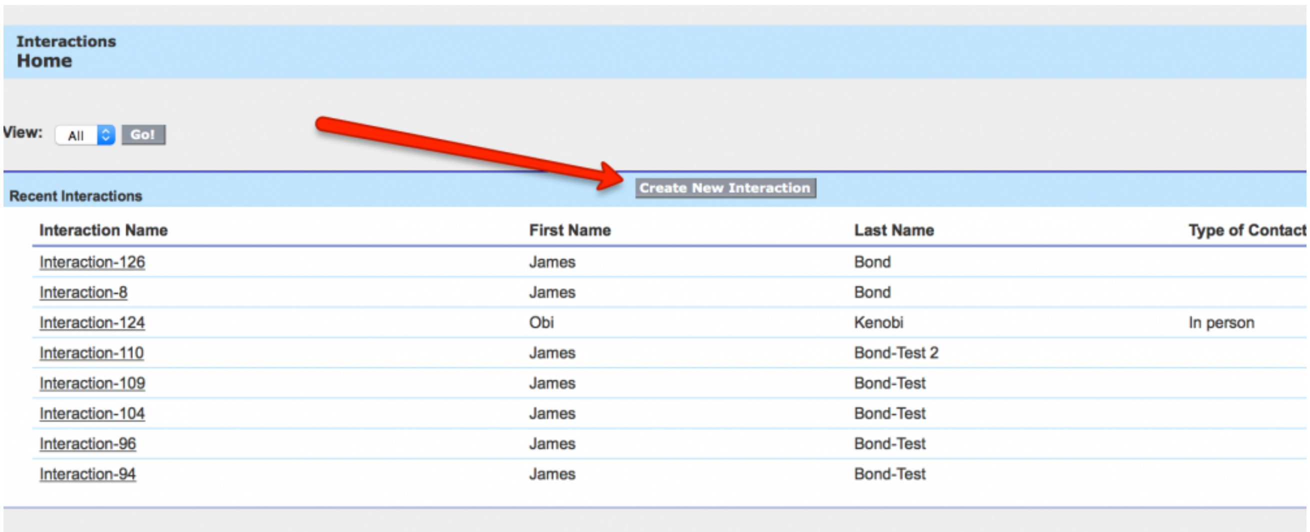
Material Distributions can be easily accounted for and reported on in RDP by making use of the Material Distribution tab. In this section of RDP, your organization is able to review and edit prior materials and create new material distributions. This tool helps your organization track digital and physical resource materials that are distributed. After navigating to the 'Material Distribution' tab, you can create a new material distribution by clicking on the grey 'Create New Material Distribution' button.



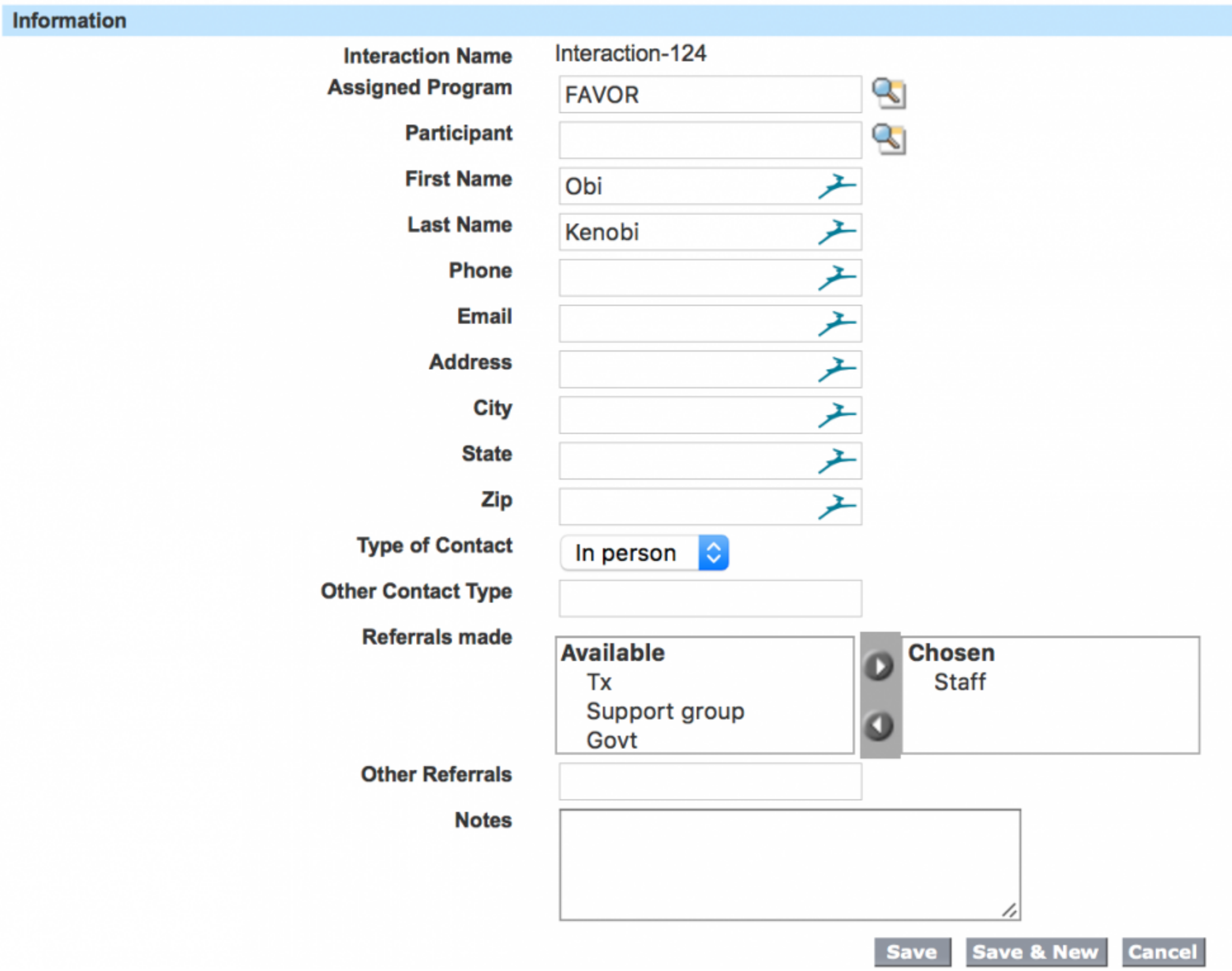
In the material distribution form, you'll be able to record details pertaining to the material, including program assignment, category, quantity distributed, etc.

8. Tracking Interactions

Recording interactions allows you to capture information that details individual interactions with your organization. This tool is especially helpful in tracking contact points with people who are not (yet) program participants. In order to create a new interaction record, navigate to the ‘Interactions’ tab in the top navigation menu and click on the grey ‘Create New Interaction’ button.



Next, you’ll fill out as much applicable detail regarding the interaction as possible, including name, contact information, contact type, and any referrals made.


Information
Interaction Name
Interaction-124
Assigned Program
FAVOR
Participant
First Name
Obi
Last Name
Kenobi
Phone
Email
Address
City
State
Zip
Type of Contact
In person
Other Contact Type
Referrals made
Available
Tx
Support group
Govt
Chosen
Staff
Other Referrals
Notes
Save
Save & New
Cancel

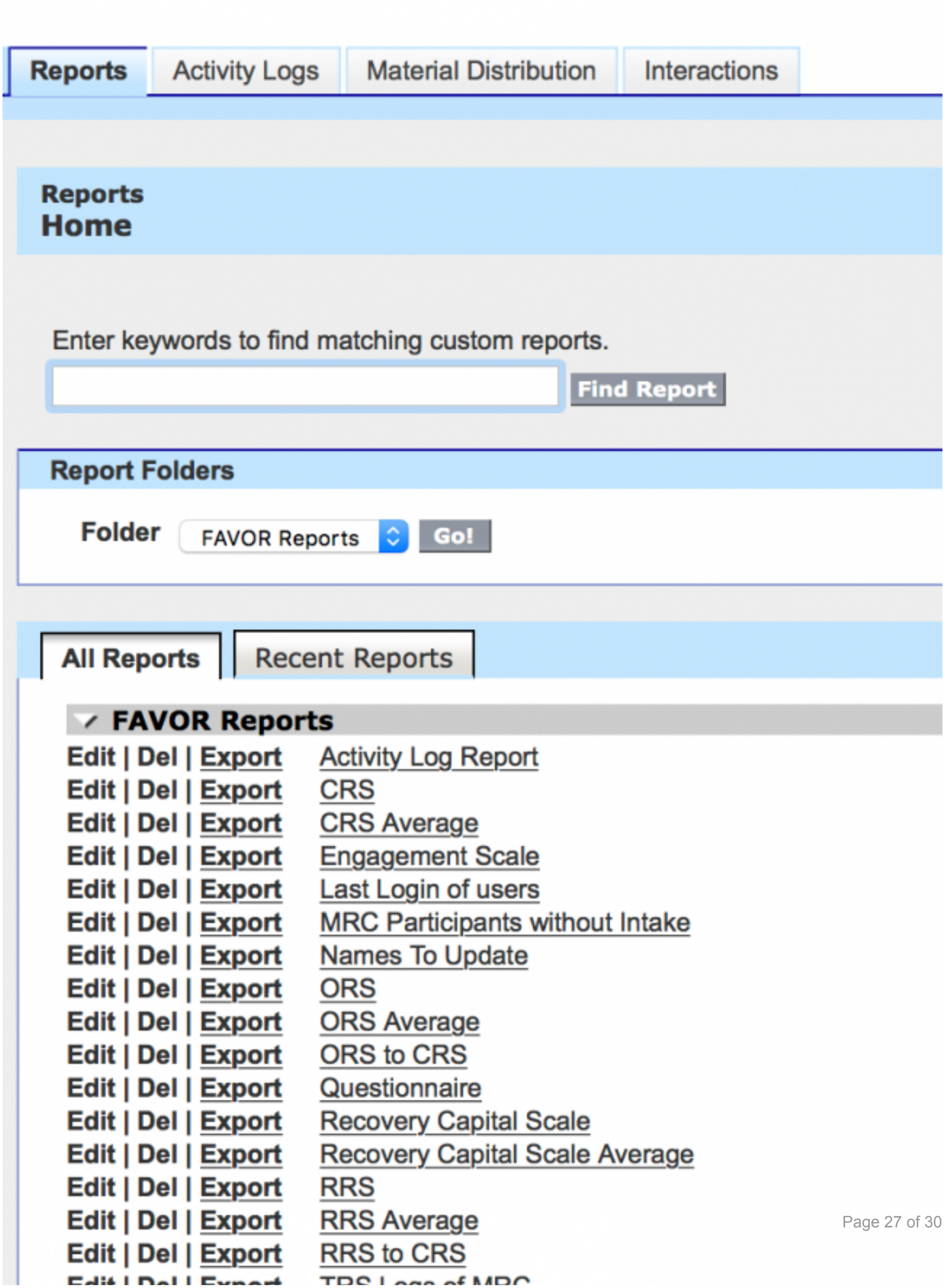
9. Visualizing Data with Reports

Vizualizing aggregate data, and telling the story of your organization's work, can be accomplished by working out of the 'Reports' tab, found in the top navigation menu.

Each RDP instance includes 13 ready-to-run reports that detail:

- Activity Logs
- CRS
- CRS Averages
- Engagement Scale
- User Login Records (Adoption)
- ORS
- ORS Averages
- ORS to CRS
- Recovery Capital Scale
- Recovery Capital Scale Averages
- RRS
- RRS Averages
- RRS to CRS

Each of these reports can be ran by clicking on the 'All Reports' tab, and then clicking on the appropriate report. You can also utilize the report search bar if you're having trouble.


Reports
Activity Logs
Material Distribution
Interactions
Reports
Home
Enter keywords to find matching custom reports.
Find Report
Report Folders
Folder
FAVOR Reports
Go!
All Reports
Recent Reports
FAVOR Reports
Edit | Del | Export Activity Log Report
Edit | Del | Export CRS
Edit | Del | Export CRS Average
Edit | Del | Export Engagement Scale
Edit | Del | Export Last Login of users
Edit | Del | Export MRC Participants without Intake
Edit | Del | Export Names To Update
Edit | Del | Export ORS
Edit | Del | Export ORS Average
Edit | Del | Export ORS to CRS
Edit | Del | Export Questionnaire
Edit | Del | Export Recovery Capital Scale
Edit | Del | Export Recovery Capital Scale Average
Edit | Del | Export RRS
Edit | Del | Export RRS Average
Edit | Del | Export RRS to CRS

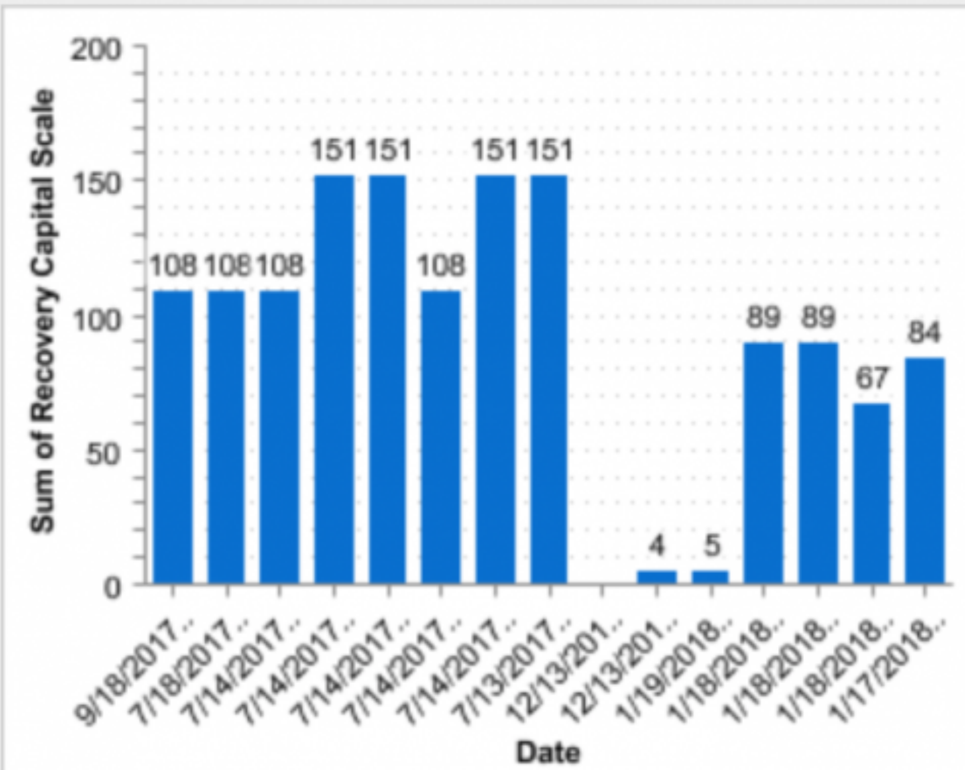
Each report can be printed or exported by clicking on the grey ‘Printable View’ or ‘Export Details’ buttons.

Report Generation Status: Complete

Report Options:
Run Report | Hide Details | Printable View | Export Details

Generated Chart:

Large | Medium | Small



Generated Report:

Filtered By: Edit
Form Type equals **Recovery Capital Data** Clear

Participant: Name	Form: Form Name	Recovery Capital Scale
Date: 9/18/2017-05:54:10pm (1 record)		
		108
Jane Bond	Form-76	108
Date: 7/18/2017-05:25:37pm (1 record)		
		108
James Bond-Test 2	Form-131	108

In the event that your organization needs to build custom reports, please reach out to rdp@facesandvoicesofrecovery.org. We are able to work with your organization to identify the best solution.